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ABSTRACT

The document is one of five summary reports, all part of a Pre-Technical Curriculum Planning Project for secondary students who aspire to technical employment or post secondary technical education. This report represents the results of an assessment of the northeast Florida areas technical occupations in business. A three-phase approach was utilized: (1) the identification of three broad career clusters in records system and control, secretarial science, and marketing; (2) development of a survey instrument; and (3) a review of data collecting. The following occupations are analyzed according to tasks and corresponding skills/knowledges: computer librarian; control clerk; computer programmer, operator, and scheduler; accountant; bookkeeper; legal, medical, and executive secretaries; stenographers; sales manager; buyer; displayman; credit manager; stock manager; salesperson; service deskperson; copywrite; layout artist; hotel manager; and store manager. Employment statistics and projections, conclusions and recommendations complete the document. (MW)

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SUMMARY REPORT

TECHNICAL EMPLOYMENT IN NORTHEAST FLORIDA

BUSINESS

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DUVAL COUNTY SCHOOL BOARD
PRE-TECHNICAL CURRICULUM
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INTRODUCTION

In 1971, the Duval County School Board took a major step forward in providing relevant curriculum for students when they adopted the concept of a three-program curriculum for senior high schools. The three programs decided upon by the Board were:

1. Vocational
2. College Preparatory
3. Pre-Technical

The differences between this high school curriculum and most others were that:

> The pre-technical program filled the gap between the vocational and the professional level preparation.
>
> Each of the three programs was directly related to the student's post high school plans.

The traditional programs and curriculum had made available programs that would provide the skills and knowledge for pupils desiring to enter a vocation or college, but only a few technical and no pre-technical courses were offered.

This lack of a pre-technical curriculum was not a problem unique to Duval County Schools. Investigations by staff members of the Duval County School Board of existing programs at the local and state levels, followed by consultations with state and national experts in technological education revealed that no planned program of pre-technical education at the secondary level existed in the state or in the nation. Only fragments of a pre-technical curriculum,

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and a few high school technical programs, could be found. The failure of education on a national scale to respond to the needs of certain students, industries, and businesses emphasized the requirement for a carefully prepared pre-technical curriculum at the secondary level.

Education's failure to meet the need for technical and pre-technical education provided the impetus for this project. The project's ultimate goal is to develop a pre-technical curriculum which would provide secondary students, who aspire to technical employment or post secondary technical education, with the requisite skills, knowledges, and attributes to respond successfully to current and anticipated demands of local, state, and national job markets.

Before any curriculum could be developed, an assessment had to be made of the kinds of technical occupations that presently exist in the Northeast Florida area, plus the associated skills, knowledges, and attributes needed for these occupations. This summary report presents the results of that assessment.

The study was limited to the Northeast Florida area and to selected agencies because of time and personnel constraints. However, there is no reason why the procedures used in this study would not be applicable for a wider geographic region.

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DESIGN OF THE STUDY

This study was designed to meet the following objectives with respect to technical occupations in the business field in Northeast Florida:

1. To identify the existing technical occupations and the number of present and anticipated employees in each.
2. To determine the requisite skills, knowledges, and attributes associated with successful participation in each occupation identified in (1).
3. To cluster the technical occupations.

The scope of the study required a three-phase approach.

Phase I was the identification of three broad career clusters in business. These were determined to be:

1. Record Systems and Control
2. Secretarial Science
3. Marketing

Special Area Advisory and Review Committees were established in each of the clusters. Each committee was composed of:

1. Area specialists from Florida Junior College and the Duval County School Board
2. Working technicians
3. Key representatives from the business field in Duval County.

The first function of each committee was to prepare a rough draft survey form of tasks performed in each cluster area. A tentative list of skills, knowledges, and attributes was also identified at this time. The project staff was responsible for researching the literature and making

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resources available to assist the committee members in this endeavor. After preparing the survey instrument for each area, the committee members identified agencies in the Northeast Florida area which employed personnel in technical positions and then identified key individuals within those agencies. These key individuals were contacted by staff personnel and a job task survey instrument was completed for the technical occupations existing within the employing agency. At least one of the following methods was used to complete the survey instrument for each occupation.

1. Completed by technicians supervisor.
2. Completed by technician.
3. Completed by project staff member from available job description information.

Phase II consisted of developing a written survey instrument which was mailed to businesses not contacted in Phase I. This survey was used to supplement the information obtained in Phase I, and to identify the number of present and anticipated employees in each occupation. Businesses identified in Phase II were determined from the following sources:

1. Health Planning Council of Jacksonville
2. Data Processing Management Association
3. The National Secretaries Association (National)
4. Yellow pages of the telephone directory
5. Martindale-Hubbell Law Directory, Volume I
6. Consolidated City of Jacksonville Records

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7. Chamber of Commerce listings

An attempt was made to contact each identified business where one or more workers were required to have job performance competencies in the business field.

The primary method of collecting the number of present and anticipated employees was a mailed questionnaire. This method was selected for the following reasons:

1. It allowed wider coverage and a larger number of contacts than a personal interview.
2. It was less expensive than a personal interview.
3. A mailed questionnaire allowed the agency representative to complete it at his leisure.

Follow-ups (personal visit or telephone) to the questionnaire were made to agencies that did not return the survey by a project staff member.

In Phase III, members of the Special Area Advisory Committees reviewed the data collected to date. Task forces composed of consultants and members of each area advisory committee met individually and in some cases jointly to expand and compile the lists of tasks and skills in each of the three areas. Based on these lists, a final review and modification was made by selected committee members. The results of that review are shown in Chapters 1-5 of this report.

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CHAPTER I

Identification of Technical Occupations

Business

This chapter presents a summary of the number of entry level and specialized technical occupations presently existing in Northeast Florida. The gathering of data from which the lists were derived was a continuing activity of the staff and members of the various advisory committees throughout Phases I and II.

No attempt was made by the staff or committees to interpret what was meant by various job titles or occupations in the marketing cluster. The common titles currently in use by the various businesses and industries were used, as were the job titles listed in the Dictionary of Occupational Titles.

Area	Number of Occupations Identified
I. Record Systems and Control	
A. Data Processing	6
B. Accounting	2
II. Secretarial Science	5
III. Marketing	13

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CHAPTER II

TASK ANALYSIS OF SELECTED OCCUPATIONS IN BUSINESS RELATED FIELDS

In this chapter, a task analysis for each technical occupation is given. Section I is a task analysis for occupations in Record Systems and Control; Section II is a task analysis for occupations in Secretarial Science; and Section III is a task analysis for occupations in Marketing. Each section lists the occupation and its identifying code title. An (X) appearing in the column opposite the task row for a particular occupation indicates that that task is performed in the occupation.

These task lists were compiled from information and surveys conducted in Phases I and II. The original task lists were developed by task forces composed of members of the various advisory committees from job descriptions and publications available on competencies found in business careers. From the original task lists, a written survey instrument was developed which could easily be completed by anyone familiar with the occupations. As businesses were identified who employed individuals in technical positions, they were contacted by a staff member, and at least one of the following methods was used to complete the survey instrument:

1. Completed by technicians supervisor.
2. Completed by technician.
3. Completed by personnel office staff.

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4. Completed by project staff member from available job description information.

Where several people were employed with the same job title, an attempt was made to obtain at least three completed surveys on that occupation. In those cases, a consensus of the individuals who completed the survey was necessary before listing that task as being performed in that occupation.

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CHAPTER II

TASK ANALYSIS

RECORD SYSTEMS AND CONTROL: (DATA PROCESSING)

I. Job Occupations in Record Systems and Control: (Data Processing) and Identifying Code Titles (Entry level and specialized positions)

Title:	Code:
Computer Librarian.	1
Control Clerk	2
PCAM Equipment Operator	3
Computer Operator	4
Computer Scheduler.	5
Programmer	6

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RECORD SYSTEMS AND CONTROL (DATA PROCESSING)

JOB ENTRY TASKS	CODE 1	2	3	4	5	6
1. Reads information punched into a card.	X	X	X	X	X	X
2. Codes information to be punched into cards.			X	X		X
3. Handles cards properly.			X	X		X
4. Sets up machine for punching cards.	X	X	X	X	X	X
5. Plans card layout.						X
6. Keypunches cards from source document.	X	X	X	X	X	X
7. Verifies cards to check accuracy of key punching.	X	X	X	X	X	X
8. Duplicates cards to verifier notch and corrects cards.	X	X	X	X	X	X
9. Operates sorter for alphabetic sorting.			X	X		X
10. Operates sorter for numeric sorting.			X	X		X
11. Operates sorter to group cards.			X	X		
12. Operates sorter to select specific cards.			X			
13. Operates reproducer.			X			
14. Operates collator.			X			
15. Operates interpreter to print punched data in various locations on the punched card.			X	X		
16. Operates tabulator (accounting machine).			X			
17. Computer system initialization.				X		
18. Job preparation (set up).				X		
19. Computer system operation.				X		
20. On-line peripheral operation.				X		

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RECORD SYSTEMS AND CONTROL (DATA PROCESSING)

JOB ENTRY TASKS	CODE 1	2	3	4	5	6
21. Decollate printed outputs.		X	X	X		
22. Burst printed output.		X	X	X		
23. Bind printed output.		X	X	X		
24. Analyze problem for solution.						X
25. Plan solution steps.						X
26. Code program in assembly language.						X
27. Code program in RPG.						X
28. Code program in COBOL.						X
29. Code program in FORTRAN.						X
30. Test and debug diagram.						X
31. Document program or system.						X
32. Check computer output.		X		X		X
33. Estimate run times.			X		X	X
34. Schedule work loads.					X	
35. File computer tapes and cards.						
36. Keep perpetual inventory of tapes and cards.	X	X	X	X	X	
37. Help define machine malfunction to customer engineer.			X	X		
38. Consult proper manuals.		X	X	X	X	

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CHAPTER II

TASK ANALYSIS

RECORD SYSTEMS AND CONTROL: (ACCOUNTING)

I. Job Occupations in Record Systems and Control: (Accounting) and Identifying Code Titles (Entry level and specialized positions)

Title:	Code:
Accountant.	1
Bookkeeper.	2

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RECORD SYSTEMS AND CONTROL (ACCOUNTING)

JOB ENTRY TASKS	CODE 1	2
1. Answer customer's questions on charge account billing.	X	X
2. Prepare payroll.	X	X
3. Compile and update the delinquent accounts list.		X
4. With a computer printout sheet on salesmen, amount of product sold, and cash receipts turned in, compile delinquent receipts report.	X	X
5. Compile and update list for collection agents		X
6. Process the request for credit information on a customer.		X
7. Type invoices.		X
8. Prepare time cards of all employees.	X	X
9. File and update time cards.		X
10. Process worker time slips.		X
11. Check time cards and post information pertaining to payroll.	X	X
12. Prepare bank deposit.		X
13. Verify and bank cash receipts.	X	X
14. Check and compute accounts payable.	X	X
15. Compile payroll reports and summaries.	X	
16. Post and balance monies for internal accounts.	X	
17. Compute salesman's commission.	X	X
18. Compute accounts receivable data.	X	
19. Record payments received.		X
20. Reconcile bank statement.		X

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RECORD SYSTEMS AND CONTROL (ACCOUNTING)

JOB ENTRY TASKS	CODE 1	2
21. Compile, type, and recap accounts receivable.	X	
22. Record and post accounts payable.	X	
23. Record and post accounts receivable.	X	
24. Compute and record financial report data.	X	
25. Compute and distribute payroll.	X	X
26. Compute payroll changes.	X	X
27. Prepare/help prepare bids and estimates of costs of products and services.	X	
28. Perform tasks related to electronic data processing.	X	X
29. Disburse petty cash funds.	X	X
30. Receive payments over the counter.		X
31. Prepare journal entries relating to notes payable.	X	X
32. Prepare journal entry.	X	X
33. Prepare W-2 form for new employee.	X	X
34. Collect (payroll deductions) and pay to State and Federal Governments, taxes due.	X	
35. Call customers on overdue accounts.		X
36. Prepare form 1040 (schedule C).	X	
37. Prepare an eight-column work sheet from data selected from ledger accounts.	X	

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CHAPTER II

TASK ANALYSIS

SECRETARIAL SCIENCE

II. Job Occupations in Secretarial Science and Identifying Code Titles (Entry level and specialized positions)

Title:	Code:
Legal Secretary.	1
Medical Secretary	2
Executive Secretary	3
Secretary.	4
Stenographer.	5

SECRETARIAL SCIENCE

JOB ENTRY TASKS	CODE 1	2	3	4	5
1. Take dictation in shorthand.	X	X	X	X	X
2. Take dictation on stenotype machine.	X				
3. Transcribe dictation on typewriter.	X	X	X	X	X
4. Transcribe from sound recordings.	X	X	X	X	X
5. Compose and type routine correspondence.	X	X	X	X	X
6. Type business forms.	X	X	X	X	X
7. Compile and type general reports.	X	X	X	X	X
8. Type various masters and stencils and prepare multiple copies.	X	X	X	X	X
9. Compile and type statistical reports.	X	X	X	X	X
10. Greet visitors and send to appropriate official.	X	X	X	X	X
11. Give information to callers.	X	X	X	X	X
12. Answer phone and give information to callers.	X	X	X	X	X
13. Route calls to appropriate official.	X	X	X	X	X
14. Place outgoing calls.	X	X	X	X	X
15. Arrange travel schedules and reservations.	X	X	X	X	X
16. Locate and attach appropriate file to correspondence to be answered by employer.	X	X	X	X	X
17. File correspondence and other records.	X	X	X	X	X
18. Keep personnel records.	X	X	X	X	X
19. Record minutes of staff meetings.	X	X	X	X	X
20. Prepare summons, subpoenas, complaints, motions.	X				

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SECRETARIAL SCIENCE

JOB ENTRY TASKS	CODE 1	2	3	4	5
21. Prepare and type wills, deeds, contracts, estate papers, resolutions, probate proceedings.	X				
22. Notarize signatures.	X	X	X	X	X
23. Arrange conferences and meetings.	X	X	X	X	X
24. Pay bills.	X	X	X	X	X
25. Interview and schedule for prospective employees.			X		
26. Supervise clerical workers.			X		
27. Keep reception room neat and orderly.	X	X	X	X	X
28. Type from straight copy at a speed commensurate with job entry requirements.					X
29. Make adjustments and minor repairs on the typewriter.	X	X	X	X	X
30. Prepare report forms and conference minutes.			X	X	X
31. Arrange and keep an accurate log of appointments for clients and customers.	X	X	X	X	X
32. Handle routine matters pertaining to office records.				X	X
33. Choose an appropriate filing system to use in any given situation.	X	X	X	X	X
34. Prepare materials for filing.				X	X
35. Open, sort and distribute mail.				X	X
36. Record all cash transactions neatly and accurately.	X	X	X	X	X
37. Reconcile monthly bank statements.			X	X	X
38. Prepare and make bank deposits.			X	X	X
39. Keep legal calendar up to date.	X				

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SECRETARIAL SCIENCE

JOB ENTRY TASKS	CODE 1	2	3	4	5
40. Transcribe histories, physical examinations, consultations, diagnostic test reports, and operative reports for a variety of medical services.		X			
41. Type documents from directions given in medical phraseology.		X			
42. Analyze medical records for deficiencies.		X			
43. Interpret legal requirements of preservation of medical records.		X			
44. Prepare raw data on prepared forms for future handling by computerized systems.			X	X	X
45. Operate the ten-key adding machine with speed and accuracy using the touch system.				X	X
46. Perform simple to complex mathematical problems on the semi and fully automatic rotary and listing calculators.				X	X
47. Use the full-key adding-listing machine.	X	X	X	X	X
48. Perform various duplicating operations on both fluid and stencil duplicating machines and photo copiers.				X	X

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CHAPTER II

TASK ANALYSIS

MARKETING

III. Job Occupations in Marketing and Identifying Code Titles (Entry level and specialized positions)

Title:	Code:
Sales Manager.	1
Buyer	2
Receiving Manager	3
Displayman.	4
Credit Manager	5
Credit Interviewer	6
Stock Manager.	7
Professional Salesperson	8
Service Deskperson	9
Copywriter.	10
Layout Artist.	11
Hotel/Motel Manager.	12
Store Manager.	13

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MARKETING

JOB ENTRY TASKS	CODE 1	2	3	4	5	6	7	8	9	10	11	12	13
1. Enforce good housekeeping practices and care of store property	X	X	X	X	X		X	X	X			X	X
2. Verify and adjust prices according to warehouse price lists.	X	X	X				X	X				X	X
3. Reorder basic stocks.	X	X					X					X	X
4. Talk to manufacturer representative and review their merchandise lines.	X	X					X	X				X	X
5. Supervise department stock people and sales force and help in peak periods.	X	X	X		X		X	X				X	X
6. Give sales force product information, department advertising information, and/or new policy and procedure information.	X	X	X	X	X		X	X	X	X	X	X	X
7. Write initial advertising copy information.		X								X		X	X
8. Help salesperson with any difficult sales where additional merchandise information is required	X	X						X				X	X
9. Decide when to mark down merchandise and supervise markdowns.	X	X						X				X	X
10. Supervise the merchandise fixture arrangements on the sales floor and department displays.	X	X		X			X					X	X
11. Work closely with branch or suburban department managers, providing them necessary information and coordinating their efforts.	X	X	X		X		X		X	X	X	X	X

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MARKETING

JOB ENTRY TASKS	CODE 1	2	3	4	5	6	7	8	9	10	11	12	13
12. Keep check of fast and slow moving items, recommending to buyer their reorder, marking-down or transfer from one store to another.	X						X	X				X	X
13. Keep check on the movement of department's merchandise from point of receiving to getting it on the selling floor.	X	X	X				X	X				X	X
14. Select merchandise and write purchase orders.	X	X					X	X				X	X
15. Write merchandise order cancellations.	X	X					X	X				X	X
16. Place special orders and follow through on their delivery.	X	X					X	X	X			X	X
17. Supervise periodic inventories of stock on selling floor and in stockroom.	X	X	X				X	X				X	X
18. Shop competitive departments in the city.	X	X						X				X	X
19. Estimate future sales based on past history and current trend.	X	X					X	X				X	X
20. Match receiving papers with buyer's orders.			X				X					X	X
21. Receive incoming shipments of merchandise.			X				X					X	X
22. Tally invoices, bills of lading or delivery tickets.			X				X					X	X
23. Determine discrepancies, losses, and damages and write reports.			X				X					X	X
24. Route packages to proper departments.			X				X					X	X

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MARKETING

JOB ENTRY TASKS	CODE 1	2	3	4	5	6	7	8	9	10	11	12	13
25. Keep a written record of all entering merchandise.	X	X	X				X	X				X	X
26. Track down non-delivered merchandise and make claims.	X	X	X				X					X	X
27. Check with carriers for lost merchandise.			X				X					X	X
28. Supervise receiving clerks regarding the quick forwarding of merchandise to proper department checking and marking areas			X				X						
29. Work with buyers on complaints of missing and damaged merchandise.	X		X									X	X
30. Route return-to-vendor merchandise.			X									X	X
31. Arrange displays of merchandise in store windows or showcases which will feature selling points.				X								X	X
32. Receive directions via sketches or verbally, and implements.				X							X		
33. Supervise cleaning of display windows and fixtures.				X								X	X
34. Supervise making of necessary display sets, backgrounds, and signs.		X		X								X	X
35. Gather, coordinate, and accessorize merchandise for displays.	X	X		X			X	X				X	X
36. Keep informed about seasonal sales, coming advertisements, current events, or current fashions.	X	X	X	X	X	X	X	X	X	X	X	X	X

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MARKETING

JOB ENTRY TASKS	CODE 1	2	3	4	5	6	7	8	9	10	11	12	13
37. Dress mannequins for displays and group merchandise to please the eye.	X	X		X									
38. Design and sketch displays and assist in developing storewide themes.		X		X							X		
39. Help set up window displays and interior store trim under the direction of the display assistant or manager, and supervise helpers.				X									
40. Help carry equipment for setting up displays such as ladders and staplers.				X									
41. Help dismantle displays and return merchandise to department.				X									
42. Store display fixtures and supplies.				X									
43. Personally interview and help fill out forms for persons applying for charge accounts.					X	X							
44. Question applicant's credit records.					X	X							
45. Obtain information from credit bureaus, references and other stores with whom the credit applicant has accounts.					X	X							
46. Send form letters advising individuals whether or not their accounts have been accepted.					X	X						X	X
47. Supply information to credit bureaus and credit bureau members.						X						X	X
48. Convert or transfer accounts from one type to another.	X	X			X	X		X	X			X	X

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MARKETING

JOB ENTRY TASKS	CODE 1	2	3	4	5	6	7	8	9	10	11	12	13
49. Send out bills and answer customer complaints on billing.					X	X						X	X
50. Change charge addresses for customers.					X	X						X	X
51. Call customers when accounts are delinquent.					X	X						X	X
52. Balance the credit journal.					X	X						X	X
53. Approve or reject accounts.					X							X	X
54. Arrange extension of time for paying accounts.					X							X	X
55. Send accepted credit applications to cooperating bank so that charge plates can be sent to customers.					X	X						X	X
56. Specialize in selling a certain type of merchandise or group of related merchandise.								X					
57. Develop a customer following (clientele), who can be called and informed of new merchandise.								X					
58. Is adept at suggestion selling and nearly always increases the amount of the sale.								X					
59. Inform buyer of stock shortages and customer wants.	X		X				X	X					
60. Help keep counters and display fixtures clean and attractive and stock neatly arranged.	X	X		X				X				X	X
61. Help with attractively displaying merchandise in the department and keeping displays fresh.	X	X					X	X				X	X
62. Send out promotional mail.	X	X						X				X	X

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MARKETING

JOB ENTRY TASKS	CODE 1	2	3	4	5	6	7	8	9	10	11	12	13
63. Call attention to new sale or marked down merchandise.	X	X		X			X	X		X	X	X	X
64. Trade up during a sale by emphasizing qualities of higher priced merchandise.								X					
65. Advise customer as to current fashions and styles.	X	X		X				X		X	X		
66. Assist customer in trying on and fitting garments.								X					
67. Sell by telephone.								X				X	
68. Call fitter or make appointment for fitting if alterations are needed.								X					
69. Answer customer questions on advertised merchandise.	X	X	X				X	X	X			X	X
70. Communicate clearly on complex product/service features.	X	X					X	X	X		X	X	
71. Analyze customer needs by measurement and calculation.	X	X					X				X	X	
72. Maintain package checking service for customers.									X				
73. Make special orders for customers.	X	X					X	X	X			X	X
74. Answer customer questions by telephone.	X	X	X		X	X	X	X	X			X	X
75. Take and relay messages to management.	X	X	X	X	X	X	X	X	X	X	X	X	X
76. Handle refunds, exchanges, and customer complaints.	X	X						X	X			X	X
77. Handle money orders.									X			X	X
78. Schedule repair service calls.								X	X				X

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MARKETING

JOB ENTRY TASKS	CODE 1	2	3	4	5	6	7	8	9	10	11	12	13
79. Obtain needed art work to produce brochures and handbills.										X	X	X	X
80. Establish copy theme and write appropriate copy for layout.										X		X	X
81. Fit copy; figure how much copy will fit in the required space.										X	X	X	X
82. Check availability of merchandise before ad runs.	X	X	X	X			X	X	X	X	X	X	X
83. Align similar merchandise on same ads.										X	X	X	X
84. Check price points for conformity.	X	X					X			X	X	X	X
85. Learn the points to be stressed about each article.	X	X		X			X	X		X	X	X	X
86. Obtain needed customer benefits (selling points) of merchandise for proper presentation.	X	X		X			X	X		X	X	X	X
87. Arrange illustrations and copy in proper balance.											X	X	X
88. Clip tear sheets.										X	X		
89. Check ad to assure it conforms with company policy and government regulations.										X	X	X	X
90. Take stock counts as directed by supervisor.	X	X					X	X				X	X
91. Keep records and compile reports.	X	X	X	X	X	X	X	X	X	X	X	X	X
92. Schedule the working hours and reliefs of employees.	X	X	X		X		X					X	X
93. Explain limits and terms of different type accounts to customers.	X	X		X	X	X		X	X	X		X	X

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MARKETING

JOB ENTRY TASKS	CODE 1	2	3	4	5	6	7	8	9	10	11	12	13
94. Promote good customer relations.	X	X	X	X	X	X	X	X	X	X	X	X	X
95. Help train new personnel in department.	X	X	X	X	X	X	X	X	X	X	X	X	X
96. Implement procedures for cost and quality control.	X	X					X					X	X
97. Promote store/community public relations.	X	X			X	X		X	X	X	X	X	X
98. Plan for inter-store activities.	X	X	X		X		X		X	X	X	X	X
99. Complies with governmental regulations.					X							X	X
100. Maintain inventories and establish replacement procedures for equipment and furnishings.	X	X		X			X					X	X

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CHAPTER III

TASK - SKILLS/KNOWLEDGES ANALYSIS IN THE BUSINESS FIELD

This chapter presents the skills and/or knowledges for each task listed in Chapter II. The identification of these skills and knowledges was made utilizing the following resources:

1. Consultants with expertise in the appropriate area.
2. Area specialists from Florida Junior College and the Duval County School Board.
3. Job description information from business and industry.
4. Publications on business careers.

A review of the skills and knowledges was made by members of the advisory committee before final approval. However, the skills and knowledges listed should not be considered as final. Each listing will be updated and revised as curriculum is developed in the second year of the project.

I. RECORD SYSTEMS AND CONTROL
A. DATA PROCESSING

TASKS	SKILLS/KNOWLEDGES
1. Reads information punched into cards.	1.1 Skill in recognizing types of punched cards and capacities. 1.2 Skill in understanding fields and field sizes. 1.3 Skill in recognizing types of printing on cards. 1.4 Skill in recognizing the various card usages.
2. Code information to be punched into cards.	2.1 (1.1) Skill in recognizing types of punched cards and capacities. 2.2 (1.2) Skill in understanding fields and field sizes. 2.3 (1.3) Skill in recognizing types of printing on cards. 2.4 Knowledge of simple card designs and layout. 2.5 Knowledge of proper coding conventions.
3. Handles cards properly.	3.1 Knowledge of understanding functions of corner cuts and color schemes. 3.2 Knowledge of machine tolerance for cards. 3.3 Knowledge of card description. 3.4 Skill in aligning oards by riffling and jogging. 3.5 Skill in loading and unloading cards to and from containers with help stoppers and stubs.

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I. RECORD SYSTEMS AND CONTROL
A. DATA PROCESSING

TASKS	SKILLS/KNOWLEDGES
4. Setting up machine for punching cards.	4.1 Knowledge of parts of key-punch.
	4.2 Skill in loading card hopper.
	4.3 Knowledge of the function of the program control unit.
	4.4 Skill in manual or key feeding and registering cards for punching.
	4.5 Skill in using control switches.
	4.6 Knowledge of difference between 48 and 64 character codes.
	4.7 Knowledge of keypunching on a keypunch-verifier combination.
5. Plan card layout.	5.1 (1.1) Skill in recognizing types of punched cards and capacities.
	5.2 (1.2) Skill in understanding fields and field sizes.
	5.3 (1.3) Skill in recognizing types of printing on cards.
	5.4 (3.3) Knowledge of card description.
	5.5 Ability to specify types of data fields and sizes.
	5.6 Ability to properly locate data.

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I. RECORD SYSTEMS AND CONTROL
A. DATA PROCESSING

TASKS	SKILLS/KNOWLEDGES
6. Keypunches from source document.	6.1 (1.1) Skill in recognizing types of punched cards and capacities.
	6.2 (1.2) Skill in understanding fields and field sizes.
	6.3 (1.3) Skill in recognizing types of printing on cards.
	6.4 (2.5) Knowledge of proper coding conventions.
	6.5 (3.1) Knowledge of understanding functions of corner cuts and color schemes.
	6.6 (3.2) Knowledge of machine tolerance for cards.
	6.7 (3.3) Knowledge of card description.
	6.8 (3.4) Skill in aligning cards by riffling and joggling.
	6.9 (4.1) Knowledge of parts of keypunch.
	6.10 (4.2) Skill in loading card hopper.
	6.11 (4.3) Knowledge of the function of the program control unit.
	6.12 (4.4) Skill in manual or key feeding and registering cards for punching.
	6.13 (4.5) Skill in using control switches.
	6.14 (4.6) Knowledge of difference between 48 and 64 character codes.

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TASKS	SKILLS/KNOWLEDGES
	6.15 (4.7) Knowledge of keypunching on a keypunch-verifier combination.
	6.16 Skill in punching key or keytape at job entry speed.
7. Verifies cards to check accuracy of key punching.	7.1 (1.1) Skill in recognizing types of punched cards and capacities.
	7.2 (1.2) Skill in understanding fields and field sizes.
	7.3 (1.3) Skill in recognizing types of printing on cards.
	7.4 (3.3) Knowledge of card description.
	7.5 (3.4) Skill in aligning cards by riffling and joggling.
	7.6 Skill in sight checking codes.
	7.7 (4.1) Knowledge of parts of key punch.
	7.8 (4.2) Skill in loading card hopper.
	7.9 (4.3) Knowledge of the function of the program control unit.
	7.10 (4.4) Skill in manual or key feeding and registering cards for punching.
	7.11 (4.5) Skill in using control switches.
	7.12 (4.6) Knowledge of difference between 48 and 64 character codes.

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TASKS	SKILLS/KNOWLEDGES
	7.13 Knowledge of program control card codes.
	7.14 Knowledge of the parts of the program control unit.
	7.15 (6.16) Skill in punching key or keytape at job entry.
8. Duplicate card to verifier notch and corrects cards.	8.1 (1.1) Skill in recognizing types of punched cards and capacities.
	8.2 (1.2) Skill in understanding fields and field sizes.
	8.3 (1.3) Skill in recognizing types of printing on cards.
	8.4 (3.1) Knowledge of understanding functions of corner cuts and color schemes.
	8.5 (3.2) Knowledge of machine tolerance for cards.
	8.6 (3.3) Knowledge of card description.
	8.7 (4.1) Knowledge of parts of key punch.
	8.8 (4.2) Skill in loading card hopper.
	8.9 (4.3) Knowledge of the functions of the program control unit.
	8.10 (4.4) Skill in manual or key feeding and registering cards for punching.
	8.11 (4.5) Skill in using control switches.

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TASKS	SKILLS/KNOWLEDGES
	8.12 (4.6) Knowledge of difference between 48 and 64 character codes.
	8.13 (4.7) Knowledge of keypunching on a keypunch verifier combination.
9. Operates sorter for alphabetic sorting.	9.1 (1.1) Skill in recognizing types of punched cards and capacities.
	9.2 (1.2) Skill in understanding fields and field sizes.
	9.3 (1.3) Skill in recognizing types of printing on cards.
	9.4 (3.1) Knowledge of understanding functions of corner cuts and color schemes.
	9.5 (3.2) Knowledge of machine tolerance for cards.
	9.6 (3.3) Knowledge of card description.
	9.7 (3.4) Skill in aligning cards by riffling and joggling.
	9.8 (3.5) Skill in loading and unloading cards to and from containers with help stoppers and stubs.
	9.9 Knowledge of parts of sorter affecting alphabetic sorting.
	9.10 Skill in reverse digit sorting.
	9.11 Knowledge of various checking methods.
	9.12 Knowledge of job time estimation procedure.

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I. RECORD SYSTEMS AND CONTROL
A. DATA PROCESSING

TASKS	SKILLS/KNOWLEDGES
10. Operates sorter for numeric sorting.	10.1 (1.1) Skill in recognizing types of punched cards and capacities.
	10.2 (1.2) Skill in understanding fields and field sizes.
	10.3 (1.3) Skill in recognizing types of printing on cards.
	10.4 (3.1) Knowledge of understanding functions of corner cuts and color schemes.
	10.5 (3.2) Knowledge of machine tolerance for cards.
	10.6 (3.3) Knowledge of card description.
	10.7 (3.4) Skill in aligning cards by riffling and joggling.
	10.8 (3.5) Skill in loading and unloading cards to and from containers with help stoppers and stubs.
	10.9 Knowledge of parts of sorter affecting numeric sorting.
	10.10 (9.10) Skill in reverse digit sorting.
	10.11 (9.11) Knowledge of various checking methods.
	10.12 (9.12) Knowledge of job time estimation procedure.
11. Operates sorter to group cards.	11.1 (1.1) Skill in recognizing types of punched cards and capacities.

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I. RECORD SYSTEMS AND CONTROL
A. DATA PROCESSING

TASKS	SKILLS/KNOWLEDGES
	11.2 (1.2) Skill in understanding fields and field sizes.
	11.3 (1.3) Skill in recognizing types of printing on cards.
	11.4 (3.1) Knowledge of understanding functions of corner cuts and color schemes.
	11.5 (3.2) Knowledge of machine tolerance for cards.
	11.6 (3.3) Knowledge of card description.
	11.7 (3.4) Skill in aligning cards by rifflin; and joggling.
	11.8 (3.5) Skill in loading and unloading cards to and from containers with help stoppers and stubs.
	11.9 Knowledge of parts of sorter affecting grouping.
	11.10 (9.10) Skill in reverse digit sorting.
	11.11 (9.11) Knowledge of various checking methods.
	11.12 (9.12) Knowledge of job time estimation procedure.
12. Operates sorter to select specific cards.	12.1 (1.1) Skill in recognizing types of punched cards and capacities.
	12.2 (1.2) Skill in understanding fields and field sizes.

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TASKS	SKILLS/KNOWLEDGES
	12.3 (1.3) Skill in recognizing types of printing on cards.
	12.4 (3.1) Knowledge of understanding functions of corner cuts and color schemes.
	12.5 (3.2) Knowledge of machine tolerance for cards.
	12.6 (3.3) Knowledge of card description.
	12.7 (3.4) Skill in aligning cards by riffling and joggling.
	12.8 (3.5) Skill in loading and unloading cards to and from containers with help stoppers and stubs.
	12.9 Knowledge of parts of sorter affecting selecting.
	12.10 (9.10) Skill in reverse digit sorting.
	12.11 (9.11) Knowledge of various checking methods.
	12.12 (9.12) Knowledge of job time estimation procedure.
13. Operate a Reproducer.	13.1 (1.1) Skill in recognizing types of punched cards and capacities.
	13.2 (1.2) Skill in understanding fields and field sizes.
	13.3 (1.3) Skill in recognizing types of printing on cards.

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TASKS	SKILLS/KNOWLEDGES
	13.4 (3.1) Knowledge of understanding functions of corner cuts and color schemes.
	13.5 (3.2) Knowledge of machine tolerance for cards.
	13.6 (3.3) Knowledge of card description.
	13.7 (3.4) Skill in aligning cards by riffling and joggling.
	13.8 (3.5) Skill in loading and unloading cards to and from containers with help stoppers and stubs.
	13.9 Knowledge of the functions and parts of the reproducer.
	13.10 Skill in wiring control panel for reproducing and gangpunching.
	13.11 Skill in sight checking reproduced or gangpunched decks.
14. Operate the Collator.	14.1 (1.1) Skill in recognizing types of punched cards and capacities.
	14.2 (1.2) Skill in understanding fields and field sizes.
	14.3 (1.3) Skill in recognizing types of printing on cards.
	14.4 (3.1) Knowledge of understanding functions of corner cuts and color schemes.

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TASKS	SKILLS/KNOWLEDGES
	14.5 (3.2) Knowledge of machine tolerance for cards.
	14.6 (3.3) Knowledge of card description.
	14.7 (3.4) Skill in aligning cards by riffling and joggling.
	14.8 (3.5) Skill in loading and unloading cards to and from containers with help stoppers and stubs.
	14.9 Knowledge of the functions and parts of the collator.
	14.10 Skill in wiring control panel for matching, merging, sequence checking, and selecting.
15. Operate the Interpreter.	15.1 (1.1) Skill in recognizing types of punched cards and capacities.
	15.2 (1.2) Skill in understanding fields and field sizes.
	15.3 (1.3) Skill in recognizing types of printing on cards.
	15.4 (3.1) Knowledge of understanding functions of corner cuts and color schemes.
	15.5 (3.2) Knowledge of machine tolerance for cards.
	15.6 (3.3) Knowledge of card description.
	15.7 (3.4) Skill in aligning cards by riffling and joggling.

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TASKS	SKILLS/KNOWLEDGES
	15.8 (3.5) Skill in loading and unloading cards to and from containers with help stoppers and stubs.
	15.9 Knowledge of the functions and parts of the interpreter.
	15.10 Skill in wiring control panel for interpreting and gangprinting.
16. Operate the tabulator (accounting machine).	16.1 (1.1) Skill in recognizing types of punched cards and capacities.
	16.2 (1.2) Skill in understanding fields and field sizes.
	16.3 (1.3) Skill in recognizing types of printing on cards.
	16.4 (3.1) Knowledge of understanding functions of corner cuts and color schemes.
	16.5 (3.2) Knowledge of machine tolerance for cards.
	16.6 (3.3) Knowledge of card description.
	16.7 (3.4) Skill in aligning cards by riffling and joggling.
	16.8 (3.5) Skill in loading and unloading cards to and from containers with help stoppers and stubs.
	16.9 Knowledge of the functions and parts of the tabulator.

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TASKS		SKILLS/KNOWLEDGES	
		16.10	Skill in preparing carriage control tapes for the tabulator.
		16.11	Skill in manipulating carriage control switches for report printing.
17.	Computer System Initialization.	17.1	Skill in following procedure to power up the system and readying the operating system to accept work.
		17.2	Skill in observing computer console and peripheral console lights for indications of readiness of various devices.
18.	Job Preparation or Set Up.	18.1	Knowledge of the functions and components of a computer system.
		18.2	Ability to read schedules and systems flow chart.
19.	On-line Peripheral Operations.	19.1	Knowledge of the functions and components of a computer system.
		19.2	Skill in handling and providing identifications input/output media.
		19.3	Skill in observing peripheral console lights and respond accordingly.
		19.4	Skill in performing routine maintenance of peripheral device.

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I. RECORD SYSTEMS AND CONTROL
A. DATA PROCESSING

TASKS	SKILLS/KNOWLEDGES
20. Computer System Operation.	20.1 Knowledge of the functions and components of a computer system.
	20.2 Skill in following procedure to power up the system and readying the operating system to accept work.
	20.3 Skill in observing computer console and peripheral console lights for indications of readiness of various devices.
	20.4 Skill in initiating communication with computer through console typewriter.
	20.5 Skill in responding to computer messages on console printed.
	20.6 Skill in following procedures to provide users, systems engineers, and customer engineers with diagnostic aids.
21. Decollate printed Outputs.	21.1 Knowledge of the functions and parts of the decollator.
	21.2 Skill in adjusting controls for decollating and trimming of multiple-part reports.
22. Burst Printed Outputs.	22.1 Knowledge of the functions and parts of the burster.
	22.2 Skill in adjusting controls for bursting, trimming, and mechanically signing printed reprints.
	22.3 Knowledge of the security procedure for sensitive materials.

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TASKS	SKILLS/KNOWLEDGES
23. Bind printed Output.	23.1 Knowledge of various manual and mechanical process of binding. 23.2 Skill in effecting clean and attractively bound reports.
24. Analyze Problem for Solution.	24.1 Skill in reading or listening to problem statements. 24.2 Skill in restating outputs required as solution to problem. 24.3 Knowledge of accessibility of various resources to aid in the analysis of problem.
25. Plan Solution Steps.	25.1 Skill in reading or listening to problem statements. 25.2 Skill in restating outputs required as solution to problem. 25.3 Skill in flow charting main steps and then detail steps in the solution of a problem. 25.4 Skill in outlining input specifications. 25.5 Skill in outlining output specifications.
26. Code program in Assembly Languages.	26.1 Knowledge of the functions and components of a computer system. 26.2 Knowledge of the characteristics of various storage media.

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TASKS	SKILLS/KNOWLEDGES
	26.3 Skill in reading programs flow charts.
	26.4 Knowledge of assembly language.
	26.5 Skill in using job control statements.
	26.6 Skill in coding, program from program flow chart.
	26.7 Knowledge of basic mathematics.
27. Code Program in RPG.	27.1 Knowledge of the functions and components of a computer system.
	27.2 Knowledge of the characteristics of various storage media.
	27.3 Skill in reading programs flow charts.
	27.4 Knowledge of basic mathematics.
	27.5 Knowledge of RPG language.
	27.6 Skill in using job control statements.
	27.7 Skill in coding, program from program flow chart.
28. Code Program in COBOL.	28.1 Knowledge of the functions and components of a computer system.
	28.2 Knowledge of the characteristics of various storage media.
	28.3 Skill in reading programs flow charts.

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	SKILLS/KNOWLEDGES
	28.4 Knowledge of basic mathematics.
	28.5 Knowledge of COBOL language.
	28.6 Skill in using job control statements.
	28.7 Skill in coding, program from program flow chart.
29. Code Program in FORTRAN.	29.1 Knowledge of the functions and components of a computer system.
	29.2 Knowledge of the characteristics of various storage media.
	29.3 Skill in reading programs flow charts.
	29.4 Knowledge of basic mathematics.
	29.5 Knowledge of FORTRAN language.
	29.6 Skill in using job control statements.
	29.7 Skill in coding, program from program flow chart.
30. Test and Debug Programs.	30.1 Knowledge of the functions and components of a computer system.
	30.2 Skill in reading diagnostics.
	30.3 Skill in analyzing output.
	30.4 Skill in effecting corrections.

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I. RECORD SYSTEMS AND CONTROL
A. DATA PROCESSING

TASKS	SKILLS/KNOWLEDGES
	30.5 Skill in providing reasonable test data.
31. Document application system or program.	31.1 Skill in revising systems flowcharts or program flowcharts.
	31.2 Skill in revising input specifications.
	31.3 Skill in revising output specifications.
	31.4 Skill in assembling complete data on application system or program.
32. Check computer outputs.	32.1 Skill in reading output specifications.
	32.2 Skill in analyzing output.
	32.3 Knowledge of procedures to release outputs.
	32.4 Knowledge of statistical sampling techniques.
33. Estimate run times.	33.1 Knowledge of basic mathematics.
	33.2 Knowledge of processing speeds.
	33.3 Skill in applying formulas for calculations of estimates.
	33.4 Skill in manipulating data in operators log.
34. Schedule work loads.	34.1 Knowledge of basic mathematics.
	34.2 Skill in applying formulas for calculations of estimates.

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TASKS	SKILLS/KNOWLEDGES
	34.3 Knowledge of the nature of various data processing applications.
	34.4 Skill in assigning priorities.
35. File computer tapes and cards.	35.1 Skill in handling and providing identifications input/output media.
	35.2 Knowledge of library procedures and techniques.
	35.3 Skill in safeguarding types and cards.
36. Keep perpetual inventory of tapes and cards.	36.1 Skill in handling and providing identifications input/output media.
	36.2 Knowledge of basic mathematics.
	36.3 Knowledge of inventory technique.
	36.4 Knowledge of procedures for ordering supplies.
37. Help define machine malfunctions to customer engineer.	37.1 Skill in identifying machine malfunctions of different types of manuals.
	37.2 Skill in performing recovery procedures.
38. Consult Proper Manuals.	38.1 Knowledge of the functions of different types of manuals.
	38.2 Skill in locating specific manuals and using tables of contents, indexes and appendixes.

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I. RECORD SYSTEMS AND CONTROL
B. ACCOUNTING

	SKILLS/KNOWLEDGES
1. Answer customer's questions on charge account billing.	1.1 Knowledge of good telephone technique. 1.2 Knowledge of proper filing rules. 1.3 Skill in computation including percentage.
2. Prepare payroll.	2.1 Knowledge of required (Income Tax and FICA) and voluntary deductions (e.g. insurance and dues). 2.2 Knowledge of the correct journal entries for recording the payroll. 2.3 Skill in computation including percentage. 2.4 Skill in compiling reports and summaries. 2.5 Knowledge of how to compute gross earnings according to salary, hourly rates, piece-rate, commission, and salary commission plans. 2.6 Knowledge of how to complete payroll register and employee earnings record.
3. Compile and update the delinquent accounts list.	3.1 Knowledge of aging of accounts receivable. 3.2 Skill in computation including percentage. 3.3 Skill in typing.

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I. RECORD SYSTEMS AND CONTROL
B. ACCOUNTING

TASKS	SKILLS/KNOWLEDGES
4. Compile delinquent receipts report.	4.1 Skill in computation including percentage. 4.2 Skill in typing. 4.3 Skill in classifying and proofreading.
5. Compile and update list for collection agents.	5.1 Knowledge of aging of accounts receivable. 5.2 Skill in computation including percentage. 5.3 Skill in typing.
6. Process the request for credit information on a customer.	6.1 Knowledge of good telephone techniques when processing requests for credit information on a customer. 6.2 Skill in problem solving. 6.3 Skill in typing.
7. Type invoices.	7.1 Skill in statistical typing. 7.2 Skill in computation including percentage. 7.3 Knowledge of proper filing rules.
8. Prepare time cards for all employees.	8.1 Skill in computation including percentage.

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I. RECORD SYSTEMS AND CONTROL
B. ACCOUNTING

TASKS	SKILLS/KNOWLEDGES
9. File and update time cards.	9.1 Knowledge of proper filing rules. 9.2 Skill in classifying and proof-reading time cards. 9.3 Knowledge of computing hours worked.
10. Process worker time slips.	10.1 Skill in typing. 10.2 Knowledge of proper filing rules.
11. Check time cards and post information pertaining to payroll.	11.1 Knowledge of required (Income tax and FICA) and voluntary deductions, (insurance and dues) for preparing payroll.
12. Prepare bank deposit.	12.1 Skill in computation when preparing bank deposit. 12.2 Skill in handling money accurately.
13. Verify and bank cash receipts.	13.1 Knowledge of recording cash receipts in cash receipts journal.
14. Check and compute accounts payable.	14.1 Skill in computation including percentage. 14.2 Knowledge of extracting information desired from source documents such as invoices.

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TASKS	SKILLS/KNOWLEDGES
	14.3 Knowledge of the maintenance of subsidiary ledgers.
	14.4 Knowledge of keeping special journals and ledgers.
	14.5 Knowledge of accounting procedures involving purchase returns and allowance.
15. Compile payroll reports and summaries.	15.1 Knowledge of the establishment of time schedules for employers when compiling payroll reports.
	15.2 Skill in typing.
	15.3 Skill in statistical typing.
	15.4 Skill in mathematical computations (algorithms).
	15.5 Knowledge of how to prepare Employer's Quarterly Federal Tax Return (Form 941), Reconciliation of Income Tax Withheld and Transmittal of Wage and Tax Statements, (Form W-3).
16. Post and balance monies for internal accounts.	16.1 Knowledge of how to establish, maintain, and replenish a petty cash system.
	16.2 Skill in making the general journal entries.

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	SKILLS/KNOWLEDGES
	16.3 Knowledge of posting to Accounts Payable and Accounts Receivable.
17. Compute salesman's commission.	17.1 Knowledge of basic payroll procedures. 17.2 Skill in mathematical computations (algorithms) in computing salesman's commissions.
18. Compute Accounts Receivable data.	18.1 Knowledge of maintaining Accounts Receivable subsidiary ledger and general accounts. 18.2 Skill in mathematical computation (algorithm). 18.3 Knowledge of extracting information desired from source documents (invoices, cash receipts, orders).
19. Record payments received.	19.1 Knowledge of posting cash receipts to proper journal.
20. Reconcile bank statement.	20.1 Skill in computation including percentage. 20.2 Knowledge of preparing a bank reconciliation statement. 20.3 Knowledge of how to journalize and post any deductions so cash accounts balance will agree with adjusted checkbook balance.

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TASKS	SKILLS/KNOWLEDGES
	20.4 Skill in mathematical computations (algorithms).
21. Compile, type, and recap accounts receivable.	21.1 Knowledge of the correct accounting procedure in preparing a schedule of Accounts Receivable. 21.2 Skill in typing.
22. Record and post accounts payable.	22.1 Knowledge of how to maintain the (five) special journals and post to subsidiary accounts payable ledger/ control account. 22.2 Knowledge of the practices of good penmanship.
23. Record and post accounts receivable.	23.1 Skill in maintaining the (five) special journals and post to subsidiary accounts receivable ledger/control account. 23.2 Skill in extracting information from source documents.
24. Compute and record financial report data.	24.1 Knowledge of how to complete the accounting process including journalizing, posting, adjusting, and closing entries, worksheet Income Statement, Balance Sheet.

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TASKS	SKILLS/KNOWLEDGES
25. Compute and distribute payroll.	25.1 Knowledge of required (Income Tax and FICA) and voluntary deductions (e.g. insurance and dues). 25.2 Knowledge of the correct journal entries for recording the payroll. 25.3 Skill in computation including percentage. 25.4 Skill in compiling reports and summaries. 25.5 Knowledge of how to compute gross earnings according to salary, hourly rates, piece-rate, commission, and salary commission plans. 25.6 Knowledge of how to complete payroll register and employee earnings record.
26. Compute payroll changes.	26.1 Knowledge of required (Income Tax and FICA) and voluntary deductions (e.g. insurance and dues). 26.2 Knowledge of the correct journal entries for recording the payroll. 26.3 Skill in computation including percentage. 26.4 Skill in compiling reports and summaries.

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	SKILLS/KNOWLEDGES
	26.5 Knowledge of how to compute gross earnings according to salary, hourly rates, piece-rate, commission, and salary commission plans.
	26.6 Knowledge of how to complete payroll register and employee earnings record.
27. Prepare/help prepare bids and estimates of costs of products and services.	27.1 Knowledge of cost accounting procedures.
28. Perform tasks related to electronics data processing.	28.1 Knowledge of MTST duplicating.
	28.2 Skill in mathematical computations (algorithms).
	28.3 Skill in typing.
29. Disburse petty cash funds.	29.1 Skill in handling money accurately.
	29.2 Knowledge in maintaining the petty cash fund and making accounting entries replenish the fund.
	29.3 Skill in mathematical computations (algorithms).
30. Receive payments over the counter.	30.1 Skill in handling money accurately.

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I. RECORD SYSTEMS AND CONTROL
B. ACCOUNTING

TASKS	SKILLS/KNOWLEDGES
31. Prepare journal entries relating to notes payable and keep a notes payable register.	31.1 Knowledge of cash receipts journal and general journal entries to record note payable. 31.2 Skill in computing interest expense and pay notes when due.
32. Prepare journal entries.	32.1 Skill in correcting cash payments journal and general journal entries to record Notes Receivable.
33. Prepare Form W-2 for each employee.	33.1 Skill in statistical typing. 33.2 Skill in computations - compile totals from Employee Earnings Record.
34. Collect (payroll deductions) and pay to state and Federal Governments taxes due.	34.1 Knowledge of all taxes imposed on employers and employees.
35. Call customer who has overdue account.	35.1 Knowledge of telephone techniques when calling customers regarding overdue accounts. 35.2 Knowledge of psychology and human relations.
36. Prepare Form 1040 (Schedule C) Profit (or Loss) from Business or Profession.	36.1 Skill in extracting information needed from source document. 36.2 Skill in statistical typing.

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I. RECORD SYSTEMS AND CONTROL
B. ACCOUNTING

TASKS	SKILLS/KNOWLEDGES
37. Prepare an eight-column worksheet from data selected from ledger accounts.	37.1 Knowledge of complete accounting cycle including journalizing and posting transactions. 37.2 Skill in mathematical computations (algorithms). 37.3 Skill in statistical typing.

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II. SECRETARIAL SCIENCE

TASKS	SKILLS/KNOWLEDGES
1. Take dictation in shorthand.	1.1 Knowledge of shorthand theory. 1.2 Skill in taking shorthand at job entry level speed. 1.3 Skill in shorthand proofreading and correction.
2. Take dictation on stenotype machine.	2.1 Knowledge of stenotype machine use in dictation. 2.2 Theory of stenotype phonics. 2.3 Skill in operation of stenotype machine at job entry level speed.
3. Transcribe dictation on typewriter.	3.1 Knowledge of shorthand theory. 3.2 Skill in typing at job entry level speed. 3.3 Skill in typing directly from shorthand notes. 3.4 Knowledge of fundamental typewriter techniques as follows: A. Keyboard B. Mechanism and spacing C. Care and maintenance 3.5 Knowledge of correct format, grammar, spelling, and punctuation. 3.6 Skill in proofreading and correction of typed copy. 3.7 Skill in following directions.

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II. SECRETARIAL SCIENCE

TASKS	SKILLS/KNOWLEDGES
4. Transcribe from sound recordings.	4.1 Knowledge of the operation of dictating and transcribing machines.
	4.2 Skill in typing at job entry level speed.
	4.3 Knowledge of fundamental typewriter techniques as follows: A. Keyboard B. Mechanism and spacing C. Care and maintenance
	4.4 Knowledge of correct format, grammar, spelling, and punctuation.
	4.5 Skill in proofreading and correction.
	4.6 Skill in following directions.
5. Compose and type routine correspondence.	5.1 When composing and typing routine correspondence, have knowledge of the operations of business agency in which employed.
	5.2 Knowledge of suitable vocabulary for the subject matter.
	5.3 Skill in good sentence structure.
	5.4 Knowledge of correct forms used in business letter writing.
	5.5 Skill in proper use of dictionary and other reference materials.
	5.6 Knowledge of correct format, grammar, spelling, and punctuation.

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II. SECRETARIAL SCIENCE

TASKS	SKILLS/KNOWLEDGES
6. Type business forms.	6.1 Knowledge of fundamental typewriter techniques when typing business forms, as follows: A. Keyboard B. Mechanism and spacing C. Care and maintenance 6.2 Knowledge of special typing techniques. 6.3 Knowledge of subject matter and various forms in use.
7. Compile and type general reports.	7.1 When compiling and typing general reports have knowledge of fundamental typewriter techniques as follows: A. Keyboard B. Mechanism and spacing C. Care and maintenance 7.2 Skill at collating and coordinating information. 7.3 Knowledge of special typing techniques concerning blocking, display typing and spacing. 7.4 Skill in proofreading and correction, of typed copy.
8. Type various masters and stencils and prepare multiple copies.	8.1 Knowledge of machine limitations in number of reproductions of multiple copy, various masters, and stencils. 8.2 Knowledge of proper use of materials for copy work.

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TASKS	SKILLS/KNOWLEDGES
	8.3 Skill in correction techniques when making copy.
	8.4 Skill in following directions.
	8.5 Knowledge of various duplicating methods.
	8.6 When typing masters, stencils, and preparing multiple copy, have knowledge of fundamental typewriter techniques as follows: A. Keyboard B. Mechanism and spacing C. Care and maintenance
9. Compile and type statistical reports.	9.1 Skill in locating associated information when compiling and typing statistical reports.
	9.2 Skill at collating and coordinating information.
	9.3 Knowledge of special typing techniques concerning blocking, display typing and spacing.
	9.4 Knowledge of results desired and purpose.
	9.5 Skill in proofreading and correction of typed copy.
10. Greet visitors and send to appropriate official.	10.1 Knowledge of office functions when greeting visitors.
	10.2 Skill in office etiquette and ethics when greeting visitors.
	10.3 Knowledge of office layout and organizational chart.

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TASKS	SKILLS/KNOWLEDGES
	10.4 Skill in scheduling office appointments.
11. Give information to callers.	11.1 Skill in office etiquette and ethics when giving information to callers. 11.2 Knowledge of office layout and organizational chart. 11.3 Knowledge of organization policy on information and public relation.
12. Answer phone and give information to callers.	12.1 Skill in telephone etiquette and usage. 12.2 Knowledge of telephone services available. 12.3 Skill in office etiquette and ethics. 12.4 Knowledge of office layout and organizational chart. 12.5 Knowledge of organization policy on information and public relations.
13. Route calls to appropriate official.	13.1 Skill in deciphering nature and purpose of call. 13.2 Knowledge of organizational chart.
14. Place outgoing calls.	14.1 Skill in telephone etiquette and usage when placing outgoing calls. 14.2 Knowledge of telephone service available.

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TASKS	SKILLS/KNOWLEDGES
	14.3 Skill in usage of telephone directories and other references.
15. Arrange travel schedules and reservations.	15.1 Skill in preparing itinerary with dates and time when arranging travel schedules and reservations.
	15.2 Knowledge of various travel agencies, services, and directories such as OAG, Redbook, etc.
	15.3 Skill in making travel and lodging reservations.
	15.4 Skill in checking departure/arrival times, flight numbers, gate numbers and time changes.
	15.5 Skill in making arrangements for deposits, guarantees, and ticket pick-ups.
16. Locate and attach appropriate file to correspondence to be be answered by employer.	16.1 Knowledge of filing system in use.
	16.2 Knowledge of filing equipment and supplies in use.
	16.3 Skill in the proper use of filing equipment.
17. File correspondence and other records.	17.1 Knowledge of filing system in use.
	17.2 Knowledge of filing equipment and supplies in use.
	17.3 Skill in the proper use of filing equipment.
	17.4 Knowledge of cross references.

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II. SECRETARIAL SCIENCE

TASKS	SKILLS/KNOWLEDGES
18. Keep personnel records.	18.1 Knowledge of filing system in use.
	18.2 Skill in checking, updating and filing personnel records.
	18.3 Skill in checking and recording attendance.
19. Record minutes of staff meetings.	19.1 Knowledge of shorthand theory (recording minutes of staff meetings).
	19.2 Skill in job entry level speed.
	19.3 Skill in shorthand proofreading and correction.
	19.4 Skill in typing at job entry level speed.
	19.5 Skill in typing directly from shorthand notes.
	19.6 Knowledge of fundamental typewriter techniques as follows: A. Keyboard B. Mechanism and spacing C. Care and maintenance
	19.7 Knowledge of correct format, grammar, spelling, and punctuation.
20. Prepare summons, subpoenas, complaints, motions.	20.1 Knowledge of legal office practices and procedures when preparing summons, subpoenas, complaints, motions.
	20.2 Skill in the usage of legal vocabulary.

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II. SECRETARIAL SCIENCE

TASKS	SKILLS/KNOWLEDGES
	20.3 Knowledge of standard legal forms and their usage.
	20.4 Skill in typing at job entry level speed.
	20.5 Knowledge of fundamental typewriter techniques when typing legal documents: A. Keyboard B. Mechanism and spacing C. Care and maintenance
	20.6 Knowledge of correct format, grammar, spelling, and punctuation.
21. Prepare and type wills, deeds, contracts, estate papers, resolutions, probate proceedings.	21.1 Knowledge of shorthand theory.
	21.2 Skill in job entry level speed.
	21.3 Skill in shorthand proofreading and correction.
	21.4 Skill in typing at job entry level speed.
	21.5 Skill in typing directly from shorthand notes.
	21.6 Knowledge of fundamental typewriter techniques as follows: A. Keyboard B. Mechanism and spacing C. Care and maintenance
	21.7 Knowledge of legal office practices and procedures.
	21.8 Skill in the usage of legal vocabulary.
	21.9 Knowledge of standard legal forms and their usage.

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II. SECRETARIAL SCIENCE

TASKS	SKILLS/KNOWLEDGES
22. Notarize signatures.	22.1 Knowledge of state laws pertaining to notary publics.
	22.2 Skill in care of and safe keeping of seal.
23. Arrange conferences and meetings.	23.1 Skill in using telephone with courtesy and effectiveness when arranging conferences and meetings.
	23.2 Knowledge of limitations of meeting area.
24. Pay bills.	24.1 Knowledge of record keeping when paying bills.
	24.2 Skill in writing checks.
	24.3 Skill in balancing checkbook.
	24.4 Skill in reconciling bank statement.
	24.5 Knowledge of company petty cash procedures.
25. Interview and schedule for prospective employees.	25.1 Knowledge of office work schedule when setting up schedules for interviewing prospective employees.
	25.2 Skill in evaluating prospects background and characteristics.
	25.3 Skill in evaluating prospects experience.
	25.4 Knowledge of personal and physical qualifications required for job.

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TASKS	SKILLS/KNOWLEDGES
	25.5 Skill in the following up on references.
	25.6 Knowledge of situations in which to use technical language or common language.
26. Supervise clerical workers.	26.1 Skill in developing and maintaining harmonious relationships.
	26.2 Skill in maintaining an objective point of view in problem situations.
	26.3 Knowledge of how to recognize accomplishments of others.
	26.4 Skill in demonstrating leadership and initiative.
	26.5 Knowledge of nature of worker's duties.
	26.6 Skill in training or teaching other individuals.
27. Keep reception room neat and orderly.	27.1 Skill in organizing a functional reception room.
	27.2 Skill in keeping room accessories in place and properly aligned.
	27.3 Skill in discovery and removal of unsightly and/or unclean objects and materials.
	27.4 Skill in maintaining an orderly desk.

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II. SECRETARIAL SCIENCE

TASKS	SKILLS/KNOWLEDGES
28. Type from straight copy at a speed commensurate with job entry requirements.	28.1 Skill in typing at job entry level speed. 28.2 Knowledge of fundamental typewriter techniques as follows: A. Keyboard B. Mechanism and spacing C. Care and maintenance 28.3 Knowledge of correct format, grammar, spelling, and punctuation.
29. Make adjustments and minor repairs on the typewriter.	29.1 Knowledge of fundamental typewriter techniques to make adjustments and minor repairs to: A. Keyboard B. Mechanism and spacing C. Care and maintenance 29.2 Skill in the use of simple hand tools.
30. Prepare report forms and conference minutes.	30.1 Knowledge of fundamental typewriter techniques as follows: A. Keyboard B. Mechanism and spacing C. Care and maintenance 30.2 Knowledge of report forms being used. 30.3 Knowledge of correct format, grammar, spelling, and punctuation. 30.4 Skill in effective use of vocabulary. 30.5 Skill in proofreading and correction of typed copy.

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TASKS	SKILLS/KNOWLEDGES
	30.6 Skill in following directions.
31. Arrange and keep an accurate log of appointments for clients and customers.	31.1 Knowledge of appointment log book format for clients and customers. 31.2 Skill at keeping log book at convenient location for quick service. 31.3 Skill in communicating effectively with clients. 31.4 Skill in listening to clients' names and other pertinent information and listing them accurately.
32. Handle routine matters pertaining to office records.	32.1 Knowledge of office routine. 32.2 Knowledge of various records kept in office. 32.3 Knowledge of filing systems in use. 32.4 Knowledge of classification of records. 32.5 Skill in keeping accurate records.
33. Choose an appropriate filing system to use in any given situation.	33.1 Knowledge of the various filing systems. 33.2 Skill in using various filing systems to meet a given situation. 33.3 Knowledge of filing equipment and supplies.

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II. SECRETARIAL SCIENCE

TASKS	SKILLS/KNOWLEDGES
34. Prepare materials for filing.	34.1 Knowledge of the various filing systems. 34.2 Skill in using various filing systems to meet a given situation. 34.3 Skill in matching material for filing to the system.
35. Open, sort and distribute mail.	35.1 Knowledge of office layout and organizational chart.
36. Record all cash transactions neatly and accurately.	36.1 Knowledge of record keeping. 36.2 Knowledge of company petty cash procedures. 36.3 Ability to post journal entries to ledger. 36.4 Ability to balance cash account.
37. Reconcile bank statements (monthly).	37.1 Skill in reconciling bank statement.
38. Prepare and make bank deposits.	38.1 Skill in money handling situations. 38.2 Knowledge of preparing a deposit slip. 38.3 Skill in basic mathematical computation.
39. Keep legal calendar up to date.	39.1 Knowledge of legal office practices and procedures.

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TASKS	SKILLS/KNOWLEDGES
	39.2 Skill in communicating effectively with clients.
	39.3 Skill in listening to clients' names and other pertinent information and listing them accurately.
	39.4 Skill in telephone etiquette and usage.
	39.5 Skill in the usage of legal vocabulary.
40. Transcribe histories, physical examinations, consultations, diagnostic test reports, and operative reports for a variety of medical services.	40.1 Skill in proofreading and making corrections when performing duties as a medical secretary.
	40.2 Skill in following directions.
	40.3 Knowledge of the operation of dictating and transcribing machines.
	40.4 Skill in transcribing - summaries of patients.
	40.5 Knowledge of medical terminology and disease etiology.
	40.6 Knowledge of the business and professional relationships and ethics involved among hospital, doctors and patients.
41. Type documents from directions given in medical phraseology.	41.1 Skill in typing at job entry level speed.
	41.2 Skill in typing directly from shorthand notes.
	41.3 Knowledge of fundamental typewriter techniques as follows: A. Keyboard B. Mechanism and spacing C. Care and Maintenance

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II. SECRETARIAL SCIENCE TASKS	SKILLS/KNOWLEDGES
	41.4 Knowledge of medical terminology and disease etiology when typing documents from directions given in medical phraseology.
42. Analyze medical records for deficiencies.	42.1 Knowledge of medical terminology and disease etiology when analyzing medical records for deficiencies. 42.2 Knowledge of the business and professional relationships and ethic involved among hospital, doctors and patients. 42.3 Skill in proofreading and correction when performing duties as a medical secretary.
43. Interpret legal requirements of preservation of medical records.	43.1 Knowledge of legal procedures for preserving medical records. 43.2 Knowledge of medical terminology and disease etiology. 43.3 Knowledge of the business and professional relationships and ethics involved among hospital, doctors and patients.
44. Prepare raw data on prepared forms for future handling by computerized systems.	44.1 Knowledge of report forms being used. 44.2 Knowledge of medical terminology and disease etiology. 44.3 Knowledge of the business and professional relationships and ethics involved among hospital, doctors and patients.

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II. SECRETARIAL SCIENCE

TASKS	SKILLS/KNOWLEDGES
45. Operate the ten-key adding machine with speed and accuracy using the touch system.	45.1 Knowledge of ten-key adding machine 45.2 Skill in using ten-key adding machine. 45.3 Knowledge of care and maintenance of machine.
46. Perform simple to complex mathematical problems on the semi and fully automatic rotary and listing calculators.	46.1 Knowledge of rotary and key-driven calculators. 46.2 Skill in using rotary and key-driven calculators. 46.3 Knowledge of care and maintenance of machine. 46.4 Knowledge of special short cut techniques.
47. Use the full-key adding-listing machine.	47.1 Knowledge of full-key adding listing machine. 47.2 Skill in using full-key adding listing machine. 47.3 Knowledge of care and maintenance of machine.
48. Perform various duplicating operations on both fluid and stencial duplicating machines and photo copiers.	48.1 Knowledge of mimeograph and duplicating machines. 48.2 Skill in using mimeograph and duplicating machines. 48.3 Knowledge of care and maintenance of machine.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
1. Enforce good housekeeping practices and care of store property.	1.1 Knowledge of good housekeeping practices for protection of persons and merchandise.
2. Verify and adjust prices according to warehouse price lists.	2.1 Skill in determining prices/markup/margin/ gross profit/cost from price codes.
3. Reorder basic stocks.	3.1 Skill in determining prices/markup/margin/ gross profit/cost from price codes. 3.2 Knowledge of reorder point. 3.3 Knowledge of reorder quantity.
4. Talk to manufacturer representative and review their merchandise lines.	4.1 Knowledge of product information, features, and benefits. 4.2 Skill in estimating order quantities rapidly.
5. Supervise department stock people and sales force and help in peak periods.	5.1 Knowledge of psychology and human relations. 5.2 Skill in directing people effectively. 5.3 Skill in making routine decisions.
6. Give sales force product information, department advertising information, and/or new policy and procedure information.	6.1 Knowledge of psychology and human relations. 6.2 Skill in oral communications over telephone or in person.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
7. Write initial advertising copy information.	7.1 Knowledge of product information, features and benefits. 7.2 Knowledge of selling points of merchandise.
8. Help salesperson with any difficult sales where additional merchandise information is required.	8.1 Knowledge of product information, features and benefits. 8.2 Skill in oral communications over telephone or in person. 8.3 Knowledge of selling points of merchandise. 8.4 Knowledge of salesmanship expertise.
9. Decide when to mark down merchandise and supervise markdowns.	9.1 Knowledge of product information, features and benefits. 9.2 Knowledge of fashion merchandising and current fashions. 9.3 Skill in directing people effectively.
10. Supervise the merchandise fixture arrangements on the sales floor and department displays.	10.1 Knowledge of store, department and merchandise. 10.2 Knowledge of fundamentals of merchandise display. 10.3 Skill in directing people effectively.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
11. Work closely with branch or suburban department managers, providing them with necessary information and coordinating their efforts.	11.1 Knowledge of psychology and human relations. 11.2 Skill in oral communications over telephone or in person. 11.3 Skill in forecasting needs and planning ahead.
12. Keep check of fast and slow moving items, recommending to buyer their reorder, marking down or transfer from one store to another.	12.1 Skill in inventory control bookkeeping. 12.2 Skill in making routine decisions. 12.3 Skill in oral communications over telephone or in person.
13. Keep check on the movement of department's merchandise from point of receiving to getting it on the selling floor.	13.1 Knowledge of merchandise demand.
14. Select merchandise and write purchase orders.	14.1 Skill in determining prices/markup/margin/gross profit/cost from price codes. 14.2 Knowledge of reorder point. 14.3 Knowledge of reorder quantity. 14.4 Knowledge of product information, features and benefits. 14.5 Skill in making routine decisions. 14.6 Knowledge of selling points of merchandise.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
	14.7 Knowledge of fashion merchandising and current fashions.
	14.8 Skill in communicating legibly in written english.
15. Write merchandise order cancellations.	15.1 Skill in making routine decisions.
	15.2 Skill in communicating legibly in written english.
16. Place special orders and follow through on their delivery.	16.1 Skill in communicating legibly in written english.
	16.2 Knowledge of special order procedures in store.
17. Supervise periodic inventories of stock on selling floor and in stockroom.	17.1 Knowledge of correct inventory procedures.
	17.2 Skill in directing people effectively.
18. Shop competitive departments in the city.	18.1 Knowledge of product information, features and benefits.
19. Estimate future sales based on past history and current trend.	19.1 Knowledge of product information, features and benefits.
	19.2 Skill in making routine decisions.
	19.3 Knowledge of fashion merchandising and current fashions.
	19.4 Skill in inventory control bookkeeping.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
20. Match receiving papers with buyer's orders.	20.1 Skill in maintaining and using order files.
21. Receive incoming shipments of merchandise.	21.1 Skill in maintaining and using order files. 21.2 Knowledge of receiving procedures. 21.3 Skill in following through without further directions.
22. Tally invoices, bills of lading, or delivery tickets.	22.1 Skill in mathematics of merchandising. 22.2 Skill in observing important details.
23. Determine discrepancies, losses, and damages and write reports.	23.1 Knowledge of receiving procedures. 23.2 Skill in mathematics of merchandising. 23.3 Skill in observing important details.
24. Route packages to proper departments.	24.1 Knowledge of store traffic procedures. 24.2 Knowledge of merchandise types and departments.
25. Keep a written record of all entering merchandise.	25.1 Skill in inventory control bookkeeping.
26. Track down non-delivered merchandise and make claims.	26.1 Knowledge of claim procedures.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
27. Check with carriers for lost merchandise.	27.1 Knowledge of receiving procedures. 27.2 Knowledge of claim procedures.
28. Supervise receiving clerks regarding the quick forwarding of merchandise to proper department checking and marking areas.	28.1 Knowledge of receiving procedures. 28.2 Knowledge of psychology and human relations. 28.3 Skill in directing people effectively. 28.4 Skill in making routine decisions. 28.5 Skill in oral communications over telephone or in person. 28.6 Skill in forecasting needs and planning ahead.
29. Work with buyers on complaints of missing and damaged merchandise.	29.1 Knowledge of claim procedures. 29.2 Skill in following through without further directions.
30. Route return-to-vendor merchandise.	30.1 Knowledge of shipping procedures.
31. Arrange display of merchandise in store windows or showcases which will feature selling points.	31.1 Knowledge of product information, features and benefits. 31.2 Knowledge of selling points of merchandise. 31.3 Knowledge of fundamentals of merchandise display. 31.4 Knowledge of simple hand tool usage.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
32. Receive directions via sketches, or verbally, and implement.	32.1 Skill in visualizing ideas. 32.2 Knowledge of fundamentals of merchandise display. 32.3 Knowledge of advertising layout principles.
33. Supervise cleaning of display windows and fixtures.	33.1 Knowledge of good housekeeping practices for protection of persons and merchandise. 33.2 Skill in directing people effectively.
34. Supervise making of necessary display sets, backgrounds, and signs.	34.1 Knowledge of simple hand tool usage. 34.2 Skill in visualizing ideas. 34.3 Knowledge of advertising layout principles. 34.4 Knowledge of fundamental merchandising display. 34.5 Skill in directing people effectively.
35. Gather, coordinate and accessorize merchandise for displays.	35.1 Knowledge of product information, features and benefits. 35.2 Knowledge of selling points of merchandise. 35.3 Knowledge of fundamental merchandise display.
36. Keep informed about seasonal sales, coming advertisements, current events or current fashions.	36.1 Skill in gathering and assimilating information for current and future use. 36.2 Skill in forecasting needs and planning ahead.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
37. Dress mannequins for displays and group merchandise to please the eye.	37.1 Knowledge of product information, features and benefits. 37.2 Knowledge of selling points of merchandise. 37.3 Knowledge of fundamental merchandising display.
38. Design and sketch displays and assist in developing storewide themes.	38.1 Skill in visualizing ideas. 38.2 Knowledge of fundamental merchandising display. 38.3 Skill in sketching ideas for displays and store trim.
39. Help set up window displays and interior store trim under the direction of the display assistant or manager, and supervise helpers.	39.1 Skill in directing people effectively. 39.2 Knowledge of fundamental merchandising display. 39.3 Knowledge of simple hand tool usage. 39.4 Skill in visualizing ideas.
40. Help carry equipment for setting up displays such as ladders and staplers.	40.1 Skill in following directions.
41. Help dismantle displays and return merchandise to department.	41.1 Knowledge of protecting merchandise from damage or loss.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
42. Store display fixtures and supplies.	42.1 Skill in protecting and conserving display equipment and supplies.
43. Personally interview and fill out forms for persons applying for charge accounts.	43.1 Knowledge of Credit Application Forms. 43.2 Knowledge of psychology and human relations. 43.3 Skill in oral communications over telephone or in person. 43.4 Skill in gathering and assimilating information for current and future use.
44. Question applicant's credit record.	44.1 Knowledge of credit practices.
45. Obtain information from credit bureaus, references and other stores with whom the credit applicant has accounts.	45.1 Skill in oral communications over telephone or in person. 45.2 Knowledge of credit practices.
46. Send form letters advising individuals whether or not their accounts have been accepted.	46.1 Skill in typing.
47. Supply information to credit bureaus and credit bureau members.	47.1 Knowledge of credit practices. 47.2 Skill in typing. 47.3 Knowledge of credit reporting forms.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
48. Convert or transfer accounts from one type to another.	48.1 Knowledge of credit practices.
49. Send out bills and answer customer complaints on billing.	49.1 Knowledge of credit practices. 49.2 Skill in typing. 49.3 Knowledge of psychology and human relations. 49.4 Skill in use of billing/posting/microfilm machine.
50. Change charge addresses for customers.	50.1 Skill in typing. 50.2 Knowledge of psychology and human relations.
51. Call customers when accounts are delinquent.	51.1 Knowledge of proper techniques in persuading delinquent customers to pay bills. 51.2 Knowledge of psychology and human relations. 51.3 Skill in oral communications over telephone or in person. 51.4 Knowledge of credit practices.
52. Balance the credit journal.	52.1 Knowledge of accounting principles.
53. Approve or reject accounts.	53.1 Knowledge of credit practices. 53.2 Knowledge of Credit Application Forms.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
54. Arrange extensions of time for paying accounts.	54.1 Knowledge of credit practices. 54.2 Knowledge of proper techniques in persuading delinquent customers to pay bills.
55. Send accepted credit applications to cooperating bank so that charge plates can be sent to customers.	55.1 Knowledge of credit practices. 55.2 Skill in typing.
56. Specialize in selling a certain type of merchandise or group of related merchandise.	56.1 Extensive knowledge of product. 56.2 Skill in gathering and assimilating information for current and future use.
57. Develop a customer following (clientele), who can be called and informed of new merchandise.	57.1 Skill in determining customer needs and interests. 57.2 Skill in gathering and assimilating information for current and future use.
58. Is adept at suggestion selling and nearly always increases the amount of the sale.	58.1 Knowledge of selling points of merchandise. 58.2 Knowledge of salesmanship expertise.
59. Inform buyer of stock shortages and customer wants.	59.1 Skill in determining customer needs and interests. 59.2 Skill in taking spot inventories.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
60. Help keep counters and display fixtures clean and attractive and stock neatly arranged.	60.1 Knowledge of appropriate merchandise arrangements for specific products. 60.2 Knowledge of good housekeeping practices for protection of persons and merchandise.
61. Help with attractively displaying merchandise in the department and keeping displays fresh.	61.1 Knowledge of good housekeeping practices for protection of persons and merchandise.
62. Send out promotional mail.	62.1 Skill in use of mailing lists. 62.2 Skill in communicating legibly in written english. 62.3 Skill in determining customer needs and interests.
63. Call attention to new sale or marked down merchandise.	63.1 Knowledge of selling points of merchandise. 63.2 Knowledge of salesmanship expertise. 63.3 Knowledge of fashion merchandising and current fashions.
64. Trade up during a sale by emphasizing qualities of higher priced merchandise.	64.1 Knowledge of selling points of merchandise. 64.2 Knowledge of salesmanship expertise. 64.3 Knowledge of fashion merchandising and current fashions.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
65. Advise customer as to current fashions and styles.	65.1 Knowledge of fashion merchandising and current fashions.
66. Assist customer in trying on and fitting garments.	66.1 Skill in handling garments to show off goods. 66.2 Skill in helping customers try on clothing and suggesting alterations for perfect fit.
67. Sell by telephone.	67.1 Skill in oral communications over telephone or in person. 67.2 Knowledge of selling points of merchandise. 67.3 Knowledge of salesmanship expertise.
68. Call fitter or make appointment for fitting if alterations are necessary.	68.1 Knowledge of psychology and human relations.
69. Answer customer questions on advertised merchandise.	69.1 Knowledge of advertised merchandise. 69.2 Knowledge of product information, features and benefits. 69.3 Skill in oral communications over the telephone or in person.
70. Communicate clearly on complex product/service features.	70.1 Skill in oral communications over telephone or in person. 70.2 Extensive knowledge of product.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
	70.3 Skill in determining customer needs and interests.
	70.4 Knowledge of selling points of merchandise.
	70.5 Knowledge of salesmanship expertise.
71. Analyze customer needs by measurement and calculation.	71.1 Skill in using measurement devices such as tapes, rulers and fitting aids.
	71.2 Skill in determining customer needs and interests.
	71.3 Knowledge of estimating order quantities rapidly.
	71.4 Skill in mathematics of merchandising.
	71.5 Skill in observing important details.
	71.6 Knowledge of simple hand tool usage.
	71.7 Skill in sketching floor plans.
72. Maintain package checking service for customers.	72.1 Knowledge of good housekeeping practices for protection of persons and merchandise.
	72.2 Skill in following package checking procedures.
73. Make special orders for customers.	73.1 Knowledge of special order procedures in store.
	73.2 Skill in following through without further directions.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
74. Answer customer questions by telephone.	74.1 Skill in oral communications over telephone or in person. 74.2 Extensive knowledge of product. 74.3 Skill in determining customer needs and interests.
75. Take and relay messages to management.	75.1 Knowledge of psychology and human relations. 75.2 Skill in oral communications over telephone or in person.
76. Handle refunds, exchanges, and customer complaints.	76.1 Knowledge of store refund policy procedures. 76.2 Knowledge of psychology and human relations. 76.3 Skill in oral communications over telephone or in person. 76.4 Skill in determining customer needs and interests.
77. Handle money orders.	77.1 Knowledge of store policy regarding money orders, check cashing, etc.
78. Schedule repair service calls.	78.1 Skill in oral communications over the telephone or in person. 78.2 Knowledge of repair service schedule. 78.3 Skill in communicating legibly in written english.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
	78.4 Skill in determining customer needs and interests.
79. Obtain needed art work to produce brochures and handbills.	79.1 Knowledge of the fundamentals of commercial art. 79.2 Knowledge of sources of art supply. 79.3 Skill in oral communications over telephone or in person.
80. Establish copy theme and write appropriate copy for layout.	80.1 Skill in typing copy. 80.2 Skill in visualizing ideas. 80.3 Knowledge of advertising layout principles. 80.4 Skill in gathering and assimilating information for current and future use. 80.5 Knowledge of product information, features and benefits. 80.6 Knowledge of selling points of merchandise. 80.7 Knowledge of fashion merchandising and current fashions. 80.8 Knowledge of good grammar and extensive vocabulary.
81. Fit copy; figure how much copy will fit in the required space.	81.1 Skill in visualizing ideas. 81.2 Skill in sketching ideas for displays and store trim.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
	81.3 Skill in making routine decisions.
82. Check availability of merchandise before ad runs.	82.1 Skill in oral communications over telephone or in person.
83. Align similar merchandise on same ads.	83.1 Knowledge of fashion merchandising and current fashion.
	83.2 Knowledge of merchandise types and departments.
	83.3 Skill in oral communications over telephone or in person.
84. Check price points for conformity.	84.1 Skill in inventory control bookkeeping.
	84.2 Knowledge of merchandise demand.
	84.3 Skill in observing important details.
85. Learn the points to be stressed about each article.	85.1 Knowledge of selling points of merchandise.
	85.2 Knowledge of salesmanship expertise.
	85.3 Skill in gathering and assimilating information for current and future use.
86. Obtain needed customer benefits (selling points) of merchandise for proper presentation.	86.1 Skill in oral communications over telephone or in person.
	86.2 Skill in gathering and assimilating information for current and future use.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
87. Arrange illustrations and copy in proper balance.	87.1 Knowledge of advertising layout principles. 87.2 Skill in sketching ideas for displays and store trim. 87.3 Knowledge of commercial art.
88. Clip tear sheets.	88.1 Knowledge of simple hand tool usage.
89. Check ad to assure it conforms with company policy and government regulations.	89.1 Knowledge of merchandise demand. 89.2 Skill in observing important details. 89.3 Knowledge of good grammar and extensive vocabulary.
90. Take stock counts as directed by supervisor.	90.1 Knowledge of correct inventory procedures. 90.2 Skill in following through without further directions.
91. Keep records and compile reports.	91.1 Skill in inventory control bookkeeping. 91.2 Skill in communicating legibly in written english. 91.3 Knowledge of correct inventory procedures. 91.4 Skill in mathematics of merchandising. 91.5 Skill in observing important details.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
	91.6 Skill in gathering and assimilating information for current and future use.
	91.7 Skill in fundamental accounting principles.
92. Schedule the working hours and reliefs of employees.	92.1 Skill in assessing work load of department.
	92.2 Skill in making routine decisions.
	92.3 Skill in forecasting needs and planning ahead.
	92.4 Knowledge of awareness of seasonal peaks.
	92.5 Knowledge of awareness of special events.
	92.6 Knowledge of awareness of business needs.
93. Explain limits and terms of different type accounts to customers.	93.1 Skill in oral communications over telephone or in person.
	93.2 Knowledge of Credit Application Forms.
	93.3 Knowledge of credit practices.
	93.4 Skill in determining customer needs and interests.
94. Promote good customer relations.	94.1 Knowledge of psychology and human relations.
	94.2 Skill in oral communications over telephone or in person.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
95. Help train new personnel in department.	95.1 Knowledge of psychology and human relations. 95.2 Skill in oral communications over telephone or in person. 95.3 Knowledge of salesmanship expertise. 95.4 Knowledge of special order procedures in store. 95.5 Knowledge of correct inventory procedures. 95.6 Knowledge of product information, features and benefits. 95.7 Knowledge of selling points of merchandise. 95.8 Knowledge of fashion merchandising and current fashions. 95.9 Skill in observing important details. 95.10 Skill in gathering and assimilating information for current and future use. 95.11 Knowledge of credit practices. 95.12 Extensive knowledge of product. 95.13 Skill in making appropriate merchandise arrangements for specific products. 95.14 Knowledge of all store operating policies.
96. Implement procedures for cost and quality control.	96.1 Knowledge of cost and quality control procedures for particular business.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
	96.2 Knowledge of store operations management.
	96.3 Knowledge of management techniques for specific business areas.
97. Promote store/community public relations.	97.1 Knowledge of psychology and human relations.
	97.2 Skill in oral communications over telephone or in person.
	97.3 Knowledge of civic affairs.
	97.4 Knowledge of civic responsibilities.
	97.5 Knowledge of economics, marketing and general business.
98. Plan for inter-store activities.	98.1 Knowledge of psychology and human relations.
	98.2 Skill in directing people effectively.
	98.3 Skill in making routine decisions.
	98.4 Knowledge of fashion merchandising and current fashions.
	98.5 Skill in forecasting needs and planning ahead.
	98.6 Skill in visualizing ideas.
	98.7 Skill in determining customer needs and interests.
	98.8 Knowledge of advertised merchandise.

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III. MARKETING

TASKS	SKILLS/KNOWLEDGES
	98.9 Skill in assessing work load of department.
	98.10 Skill in awareness of seasonal peaks.
	98.11 Skill in awareness of special events.
	98.12 Skill in awareness of business needs.
	98.13 Knowledge of management techniques for specific business areas.
99. Comply with governmental regulations.	99.1 Skill in observing important details.
	99.2 Skill in gathering and assimilating information for current and future use.
	99.3 Knowledge of credit practices.
	99.4 Knowledge of fundamental accounting principles.
	99.5 Knowledge of all store operating policies.
	99.6 Knowledge of cost and quality control procedures for particular business.
	99.7 Knowledge of store operations management.
	99.8 Knowledge of management techniques for specific business areas.
	99.9 Skill in mathematics of merchandising.
	99.10 Knowledge of economics, of marketing and general business.

III. MARKETING

TASKS	SKILLS/KNOWLEDGES
100. Maintain inventories and establish replacement procedures for equipment and furnishings.	100.1 Skill in forecasting needs and planning ahead. 100.2 Knowledge of correct inventory procedures. 100.3 Skill in protecting and conserving displaying equipment and supplies. 100.4 Knowledge of fundamental accounting principles. 100.5 Skill in awareness of business needs. 100.6 Knowledge of cost and quality control procedures for particular business. 100.7 Knowledge of store operations management. 100.8 Knowledge of management techniques for specific business areas.

CHAPTER IV

NUMBER OF PRESENT AND ANTICIPATED EMPLOYEES IN BUSINESS OCCUPATIONS

This chapter presents a breakdown of the number of present and anticipated employees for the identified technical occupations. The data from which these tables were developed was a continuing process of the staff throughout Phases I and II. It was compiled through the use of one written survey by the Project Staff and the results of two independent surveys run previously by other organizations. The project survey form was forwarded to (766) seven hundred sixty six agencies, businesses and industrial firms in Duval County. The results of this survey plus the previously compiled results in surveys completed by the Health Planning Council of Jacksonville (completed 1972) and the Florida Department of Commerce (completed Oct., 1971), identified the number of individuals employed in the technical business occupations.

A confidential supplementary report consolidating the information compiled in the project survey, not to be released publicly, will give the names of the business firms and industries and their responses. This report will also be part of the final project report.

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NUMBER OF PRESENT AND ANTICIPATED EMPLOYEES

BUSINESS OCCUPATIONS

	Position Identification	Number of Current Employees	New Employees Anticipated 12 Months
	Record Systems and Control		
1.	Computer Librarian	26	5
2.	Control Clerk	141	28
3.	PCAM Equipment Operator	107	11
4.	Computer Operator	283	53
5.	Computer Scheduler	31	6
6.	Programmer	157	19
7.	Accountant	464	10
8.	Bookkeeper	392	17
	TOTAL	1,601	149

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NUMBER OF PRESENT AND ANTICIPATED EMPLOYEES

BUSINESS OCCUPATIONS

	Position Identification	Number of Current Employees	New Employees Anticipated 12 Months
	Secretarial Science		
1.	Legal Secretary	189	12
2.	Medical Secretary	209	10
3.	Executive Secretary	133	5
4.	Secretary	1,171	20
5.	Stenographer	1,075	34
	TOTAL	2,777	81

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NUMBER OF PRESENT AND ANTICIPATED EMPLOYEES

BUSINESS OCCUPATIONS

	Position Identification	Number of Current Employees	New Employees Anticipated 12 Months
	Marketing		
1.	Sales Manager	120	3
2.	Buyer	38	3
3.	Receiving Manager	25	1
4.	Displayman	12	1
5.	Credit Manager	232	1
6.	Credit Interviewer	32	6
7.	Stock Manager	240	2
8.	Professional Salesperson	1222	27
9.	Service Deskperson	717	22
10.	Copywriter	22	3
11.	Layout Artist	10	0
12.	Hotel/Motel Manager	99	17
13.	Store Manager	291	14
	TOTAL	3,060	100

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CHAPTER V

CONCLUSIONS AND RECOMMENDATIONS

This chapter presents the conclusions and recommendations of the Project Staff as they relate to the Business Area of technical education.

This chapter did not appear in the original summary report due to the fact that sufficient time was not available to review the findings with each of the Special Area Advisory Committee members. The staff also felt that feedback and recommendations from the Joint Planning Committee and the General Advisory Committee would be beneficial information to have before any summaries were written.

Therefore, the comments included in this section represent the opinions of individuals with expertise in the Business Area who have reviewed all available data. Such opinions should not be considered final or mutually exclusive of other judgments in that they are only presented here as a summary of the Project Staff's findings.

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CHAPTER V

CONCLUSIONS AND RECOMMENDATIONS

Partially because public education has failed to provide quality technical training or true career education for business and commercial occupations, there is a projected long-term shortage of people prepared for sales, record keeping and data processing, office and secretarial work and related areas. Since the beginning of the 20th century, "business" has steadily lost status and appeal except for executive and top managerial positions. The result has been an oversupply of overeducated and over qualified "management scientists" and a shortage of technical level personnel.[1]

Furthermore, rather than staff with over qualified people, as was once the practice, business is increasingly searching for the appropriately trained individual. Clearly, it is the responsibility of the educational community to respond to these needs.

The northeastern Florida area, in particular, Duval County, is a business and commercial hub for much of the state. Thus, even if the responsibility did not exist for providing a broad base in occupational training because of the highly mobile nature of contemporary society, local requirements would dictate a high priority for developing relevant curricula in this area.

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[1] Forbes, July 14, 1972

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Additional developments which suggest the growing need for pre-technical training in the business area are briefly cited below:

1. Record Systems and Control

There was once wide spread fear that automatic data processing would replace people. Not only did this fail to happen, but the reverse proved the case . . . more jobs rather than fewer. Moreover, the structure of jobs which is emerging includes increasing members of technical occupations.

For example, the trend towards installation and use of generalized "data management systems" (e.g., GIS, MARK IV) is creating a demand for technician level programmers, rather than the professional level "analyst programmer" once required. At the same time, increasing use of source data automation techniques (e.g., optical scanning) is reducing the number of dead end "menial" jobs (e.g., key punch operators). Thus the pressure for mid-level technicians is being applied from both above and below.

2. Office and Secretarial Positions

The skills required for competence as a secretary are changing rapidly. Sophisticated office equipment (e.g., MAG-card typewriters, electrostatic copiers) has reduced the load of repetitive, routine work, and is making increasing demands on technical skills.

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Trends toward group practice, pre-paid insurance plans, plus federal and local programs (e.g., medicaid), are leading to a more complex office work and greater needs for skilled medical secretaries. In the case of legal and executive secretaries, use of computerized office management services, the "MTST" and other similar developments are making the job different and leading to the need for new, relevant curricula.

3. Marketing and Sales

"Consumerism" is bound to lead to more careful buying practices on the part of more people. This does not, however, mean less buying (and selling); merely that the criteria for selecting purchases are changing. This, in turn, will mean that sales and merchandising personnel will have to become better informed about their products, more knowledgeable about their use, and in general, more creative in their selling or marketing.

In addition, advanced technology in the graphic arts is leading to wider use of multi-media approaches and exotic material in displays, advertising, and promoting. This means a need for more technically trained people familiar with the latest developments in plastics, printing, lighting and so forth.

Finally, the range of "acceptable" taste is widening rapidly and Americans are becoming far more cosmopolitan aesthetically. This is leading to "specialty" merchandising and the trend toward the self-contained "boutique".

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This, in turn, creates a need for technically equipped staff who make buying and marketing decisions, as well as handle sales, keep records, and "manage" in the conventional sense. The growing interest of young people in "doing their own thing" is making this a viable economic concept.